



User Guide

Chapter 17

Event Registration

Table of Contents

| | |
|---------------------------------------|----|
| Introduction..... | 3 |
| Accessing Event Registration..... | 3 |
| Event Center | 3 |
| Event Calendar | 3 |
| Event Search..... | 4 |
| My Events | 5 |
| Registering for an Event | 5 |
| Packages | 8 |
| Event Administration..... | 12 |
| Manage Events | 12 |
| Adding an Event..... | 14 |
| Basic Information | 14 |
| Registration Types | 16 |
| Agenda..... | 18 |
| Policies..... | 19 |
| Lodging | 21 |
| Setting Prices | 22 |
| Sending Notifications | 23 |
| Tabs/Sections | 24 |
| Summary Tab/Section | 25 |
| Event Messages | 25 |
| Registration Form | 26 |
| General Tab | 26 |
| Registrant Info | 26 |
| Lodging | 27 |
| Travel..... | 27 |
| Registrant Tab..... | 27 |
| Reports | 28 |
| Configuring Event Security | 33 |
| Configuring Event Root Security..... | 35 |
| Creating Locations and Resources..... | 36 |
| Search Locations..... | 37 |
| Security..... | 37 |
| How to create a location | 37 |
| Deleting a Location..... | 39 |
| Importing Events | 39 |
| From Excel | 40 |
| From an XML File..... | 40 |

Introduction

SharpSchool's **Event Registration** is a powerful tool that will allow all users to view and register for upcoming events. This guide is intended for administrators, teachers, parents and students.

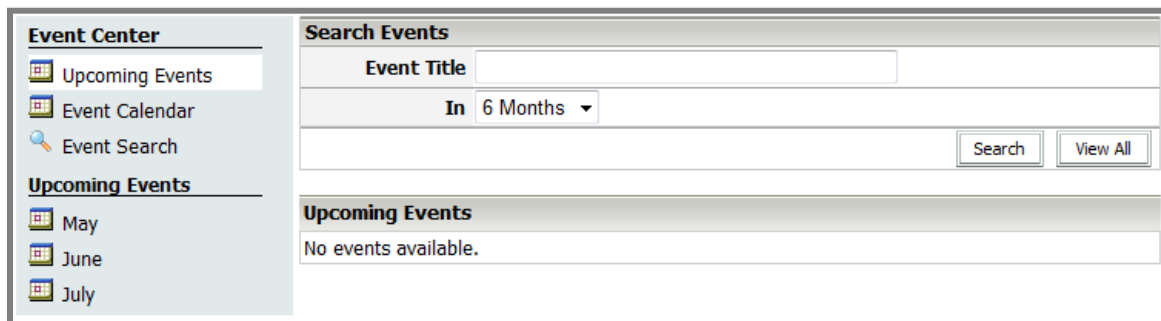
Accessing Event Registration

Event Registration can be accessed through the **Registration** link in the published links section of your website, a link placed manually on your website, or by entering in your website address and adding /ereg to the end. (e.g. <http://www.sharpschool.com/ereg>).

Your school or organization may require you to enter a username and password for security to be able to access the **Event Registration** pages. This username and password will be provided to you by your site administrator.

Event Center

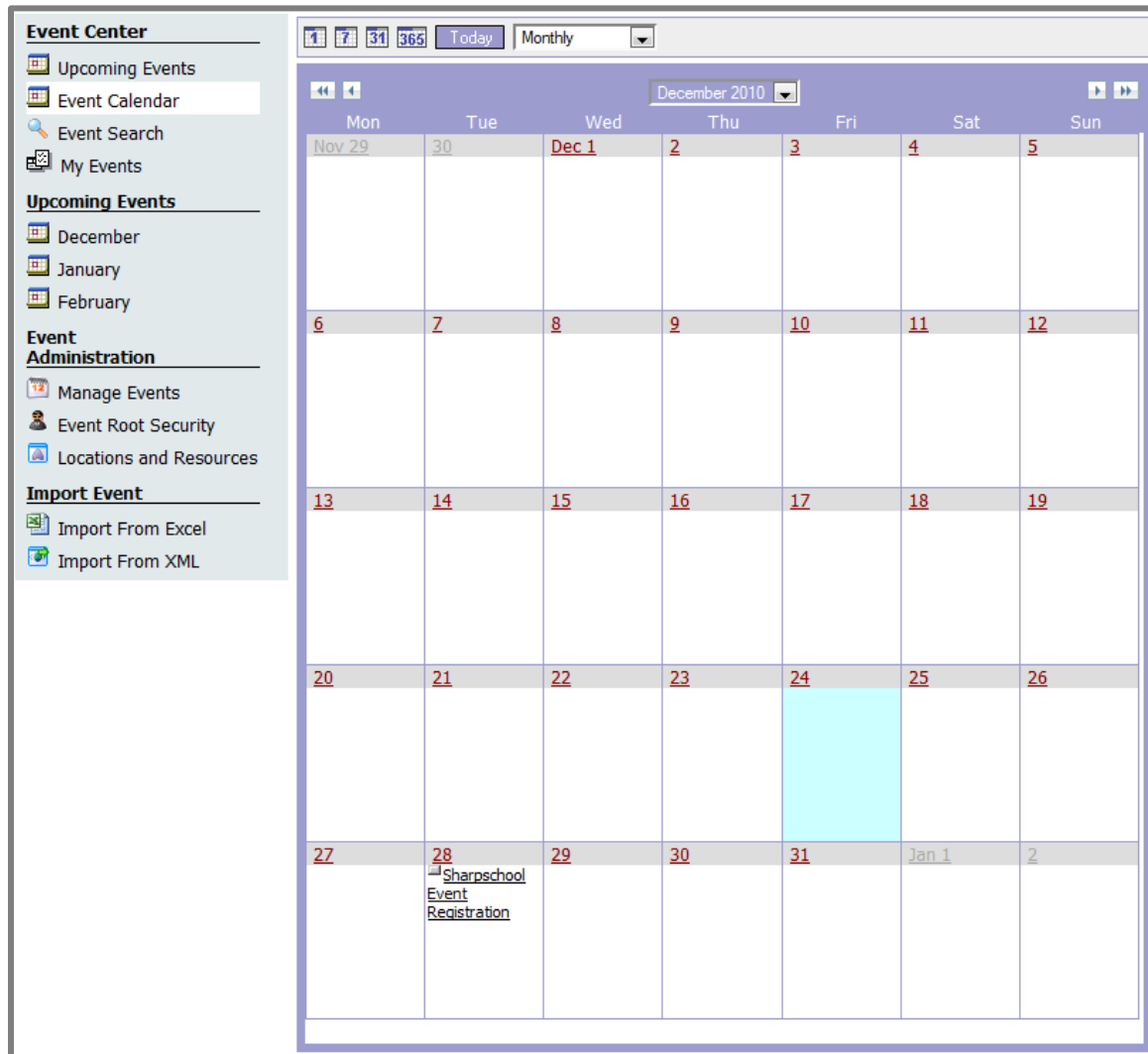
On the **Event Registration** page you will see the **Upcoming Events** section for searching events by title and a list of any events upcoming for the next 3 months..



The screenshot displays the 'Event Center' interface. On the left is a sidebar with a menu containing 'Upcoming Events', 'Event Calendar', and 'Event Search'. Below this menu is a section titled 'Upcoming Events' with links for 'May', 'June', and 'July'. The main content area is divided into two sections. The top section, 'Search Events', includes a text input for 'Event Title', a dropdown menu set to 'In 6 Months', and 'Search' and 'View All' buttons. The bottom section, 'Upcoming Events', shows the text 'No events available.'

Event Calendar

The **Event Calendar** that is part of the **Event Center** will provide you with a calendar view of the events. When you click on the event you will see the event information as well as the registration link.



Event Search

The **Event Search** option allows you to search for all events whether they are active or closed. You can search by **Language**, **Title**, **Event Type**, **Event Summary**, **Status**, or even the **Event Schedule**. The search results will appear under **Event Search Results** where you can click on the **Event Title** for more information and to register.

The screenshot shows the 'Event Search' interface. On the left is a sidebar with the 'Event Center' section containing links for 'Upcoming Events', 'Event Calendar', and 'Event Search' (which is highlighted). Below these are 'Upcoming Events' for May, June, and July. The main area is titled 'Search Events' and contains several search criteria: 'Language' (set to 'All Languages'), 'Location' (a large text input field), 'Event Title' (a text input field), 'Event Type' (set to 'All'), 'Event Summary' (a text input field), 'Status' (set to 'All Active Events'), and 'Event Schedule' (with date pickers and a 'To' label). At the bottom right of the search area are 'Search' and 'Reset' buttons.

My Events

My Events shows you which events you have registered for. You can cancel your registration under the **Actions** section by selecting the **Cancel** option. You can edit your registration by selecting the **Edit** option from the **Actions** section.

The screenshot shows the 'My Registrations' interface. The left sidebar is similar to the previous one but includes 'My Events' under the 'Event Center' section. The main area is titled 'My Registrations' and currently displays the message 'No events available.' Below this message is a large empty space.

Registering for an Event

When you are registering for an event you will first see the **Event Information** which will include a description, the language of delivery, and the date and time.

| | | | |
|---------|--------|--------|----------------|
| Summary | Agenda | Policy | Register Now ▶ |
|---------|--------|--------|----------------|

Sharpschool Event Registration Workshop

Sharpschool Event Registration Workshop

Event Information

| | |
|-----------------------------|---|
| Language of Delivery | English |
| Time | Thu, May 06, 2010 |
| Address | SharpSchool 201 Autumnview Road, Suite 200 Williamsville 14221 |

Contact Information

| | |
|----------------|-----------------------------|
| 1# Name | Joseph Mate |
| Email | joseph.mate@sharpschool.com |

When you click on the **Agenda** tab, this will show you a schedule of items or topics of discussion that are associated with this event.

| | | | |
|---------|--------|--------|----------------|
| Summary | Agenda | Policy | Register Now ▶ |
|---------|--------|--------|----------------|

Schedule

Thursday, May 06, 2010

| |
|---|
| Introduction to Event Registration 9:00 AM - 11:00 AM Location: To be announced Introduction to Event Registration |
| Event Registration Hands On Practice 11:00 AM - 12:00 PM Location: To be announced To allow participants the opportunity to practice using the Event Registration |
| Question Period 12:00 PM - 1:00 PM Location: To be announced Question Period |

The **Policy** tab will show you any policies that are associated with the event.

| | | | |
|---------|--------|--------|----------------|
| Summary | Agenda | Policy | Register Now ▶ |
|---------|--------|--------|----------------|

Event Policies

No policies available.

When you click on the **Register Now** button you will be presented with the registration information that you will need to select.

First you will see the **Registration Type**. You will be presented with a range of registration types that are applicable to your account. Choose a type and click **Next**.

The screenshot shows the 'Registration for Sharschool Event Registration Workshop' interface. At the top, a progress bar indicates the steps: Registration Type (active), Personal Information, Agenda, Lodging, Transportation & Travel, and Confirmation. Below the progress bar are 'Next' and 'Cancel' buttons. The main section is titled 'Registration Type' and contains a label 'Your Registration Type' followed by a radio button and the text 'Teachers'. At the bottom are 'Next' and 'Cancel' buttons.

You will now be asked for your information. Fill out the form completely and then click **Next**.

The screenshot shows the 'Registration for Sharschool Event Registration Workshop' interface at the 'Personal Information' step. The progress bar shows 'Registration Type' and 'Personal Information' as completed steps. Below the progress bar are 'Previous', 'Next', and 'Cancel' buttons. The main section is titled 'Personal Information' and includes a title dropdown menu with options: Mr., Mrs., Ms., and Dr. Below this are two text input fields labeled 'First Name' and 'Last Name', both marked as 'Required' in red. The next section is titled 'Business Address' and contains several text input fields: 'Street' (two lines), 'City', 'State/Province' (a dropdown menu showing 'Ontario'), 'Country' (a dropdown menu showing 'CANADA'), 'Zip/Postal Code', 'Phone', 'Fax', and 'Email'. The 'Phone', 'Fax', and 'Email' fields are marked with an asterisk (*). At the bottom are 'Previous', 'Next', and 'Cancel' buttons.

If there is an **Agenda** it will have sessions that you will be able to sign up for; select the sessions you wish to attend and click **Next**.

Packages

During the registration process there are three different packages that you may select from. There is a Basic Package, Complete Package and a Custom Package.

Basic Package - Includes all sessions in the **Agenda** that are categorized as **Mandatory** or **Regular**

Complete Package – Includes all sessions that are part of the **Agenda**

Customized Package – Includes all **Mandatory** sessions and allows you to pick and choose the **Regular** and **Optional** sessions you would like to attend



Note: The **Customized Package** option is only available if you have enabled partial registrations when creating the event.

Select Sessions:

☒ Basic Package Price: 0 NA
☐ Complete Package Price: 0 NA
☐ Customized Package. (Please select the sessions you wish to attend.)

Saturday, May 29, 2010

☒ **Introduction** (9+ seats available)
12:00 PM - 1:00 PM
Introduction
Location: [To be announced]

☐ **Hands on learning** (9+ seats available)
1:00 PM - 2:00 PM
Hands on learning
Location: [To be announced]

☐ **Q & A** (9+ seats available)
3:00 PM - 4:00 PM
Q & A
Location: [To be announced]

Your total selection is: 0 NA

Total Price: 0 NA

Calculate Price

Previous Next Cancel

If your event contains a **Lodging** preference section, select the options for **Accommodation**, **Room Preference**, **Smoking Preference**, **Meal Preferences** and **Parking Requirements** and then click **Next**.

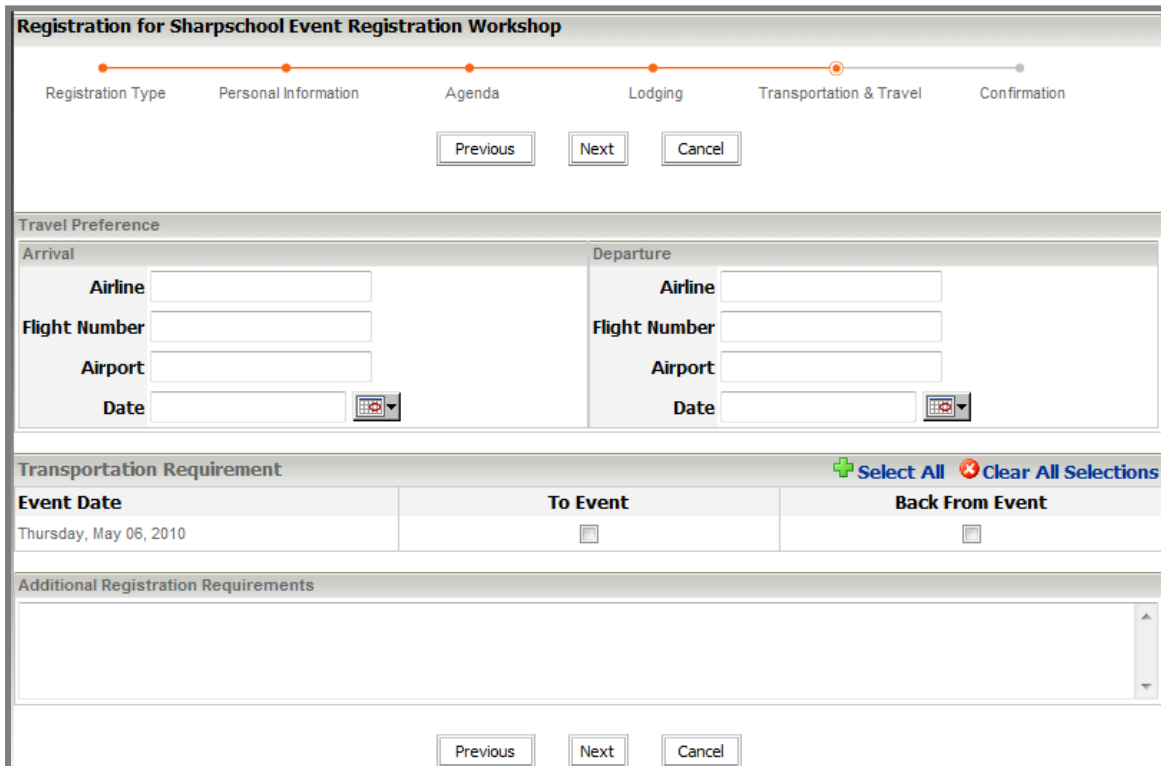
The screenshot shows a web-based registration form titled "Registration for SharpSchool Event Registration Workshop". At the top, a progress bar indicates the current step is "Lodging", with other steps being "Registration Type", "Personal Information", "Agenda", "Transportation & Travel", and "Confirmation". Below the progress bar are "Previous", "Next", and "Cancel" buttons.

The "Lodging (Hotel) Preference" section contains the following fields:

- Accommodation:** Two radio buttons: "I do not need accommodations" (selected) and "I need accommodation."
- Room Preference:** A dropdown menu set to "No preference" and a checkbox "I would like to share room with" followed by an empty text input field.
- Smoking Preference:** A dropdown menu set to "No preference".
- Meal Preference:** Three radio buttons: "No Preference" (selected), "Select a preference" (with a dropdown menu showing "Breakfast"), and "Other Preference" (with an empty text input field).
- Parking Requirement:** Two radio buttons: "I do not need parking space" (selected) and "I need parking space".

At the bottom of the form are "Previous", "Next", and "Cancel" buttons.

If your event contains a **Transportation & Travel** section, simply fill out the **Travel Preference** including **Arrival** and **Departure** sections with the **Airline**, **Flight Number**, **Airport**, and **Date**. For **Transportation Requirement** you will see the dates of your event; check the boxes for the days you will need transportation **To Event** or **Back from Event**. If you have any other special or **Additional Registration Requirements** you can fill them out in the final space and then click **Next**.



The form is titled "Registration for SharpSchool Event Registration Workshop". It features a progress bar at the top with six steps: Registration Type, Personal Information, Agenda, Lodging, Transportation & Travel (the current step), and Confirmation. Below the progress bar are "Previous", "Next", and "Cancel" buttons.

The main content area is divided into three sections:

- Travel Preference**: This section is split into "Arrival" and "Departure" columns. Each column contains four input fields: "Airline", "Flight Number", "Airport", and "Date". The "Date" fields include a calendar icon.
- Transportation Requirement**: This section includes a table with three columns: "Event Date", "To Event", and "Back From Event". The "Event Date" column shows "Thursday, May 06, 2010". The "To Event" and "Back From Event" columns each have a checkbox. Above the table are links for "+ Select All" and "x Clear All Selections".
- Additional Registration Requirements**: This section is a large text area for entering special requirements.

At the bottom of the form are "Previous", "Next", and "Cancel" buttons.

The final screen you will see is the **Registration Confirmation** screen which will summarize your selections as well as any charges associated with your registration and gives you the option to **Print**, **Cancel** or **Finish Registration**.

Registration for SharpSchool Event Registration Workshop

Registration Type Personal Information Agenda Lodging Transportation & Travel Confirmation

[Previous](#) [Finish Registration](#) [Cancel](#) [Print](#)

Registration Confirmation

Personal Information

Name Johnny Fever
Email johnny.fever@wkcp.com
Registration Type Teachers

Contact Information

Home Address , N/A
N/A

Registered Session

You have selected Complete Package

\$5.00 USD

[Show Session Information](#)

[Previous](#) [Finish Registration](#) [Cancel](#) [Print](#)

You can click on the **Show Session Information** which will show the **Agenda** for the event.

Registration Confirmation

Personal Information

Name Johnny Fever
Email johnny.fever@wkcp.com
Registration Type Teachers

Contact Information

Home Address , N/A
N/A

Registered Session

You have selected Complete Package

\$5.00 USD

[Hide Session Information](#)

Select Sessions:

Thursday, May 06, 2010

☒ **Introduction to Event Registration**
9:00 AM - 11:00 AM
Introduction to Event Registration
Location: [To be announced]

☒ **Event Registration Hands On Practice**
11:00 AM - 12:00 PM
To allow participants the opportunity to practice using the Event Registration
Location: [To be announced]

☒ **Question Period**
12:00 PM - 1:00 PM
Question Period
Location: [To be announced]

Your total selection is: 5 US

Total Price: 5 US

[Previous](#) [Finish Registration](#) [Cancel](#) [Print](#)

When you click **Finish Registration** you will see a message confirming your current registration status for the event and you will receive a confirmation email.

[Summary](#) [Agenda](#) [Policy](#)

! Your registration information for this event has been received and is waiting to be approved

Thank you for registering! Please print this page for your records.

Sharpschool Event Registration Workshop

Sharpschool Event Registration Workshop

Event Information

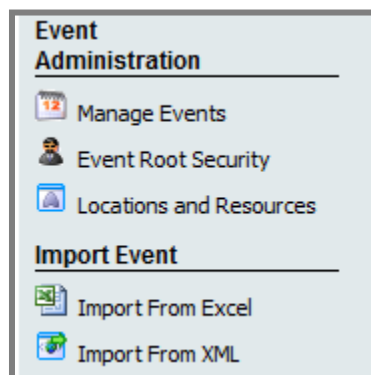
| | |
|-----------------------------|---|
| Language of Delivery | English |
| Time | Thu, May 06, 2010 |
| Address | SharpSchool 201 Autumnview Road, Suite 200 Williamsville 14221 |

Contact Information

| | |
|----------------|-----------------------------|
| 1# Name | Joseph Mate |
| Email | joseph.mate@sharpschool.com |

Event Administration

The **Event Administration** is only available to users who have administrative access or who have been assigned the rights to access the various aspects of **Event Registration**.



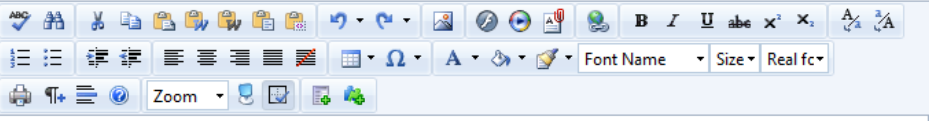

Manage Events

When you open the **Manage Events** screen you will see the **Search Events** and a listing of the events created below. You are able to view the **Title of the Event**, **Date(s)** of the event, the number of **Registrants**, **Status** and **Actions**. The **Add Event** option will allow you to create a new event.

Adding an Event


In order to add an event, please follow the steps below:

Basic Information

| | |
|--|---|
| Event Details | |
| Event Title: Sharpschool Event Registration Workshop | |
| Event Summary |  |
| | Sharpschool Event Registration Workshop |
| | |
| | |
| Design HTML Preview | |
| Event Type | Training |
| Event Code | <input type="text"/> Check Unique |
| Hotel/Location | <input checked="" type="radio"/> Select Existing Location <input type="radio"/> Input Location |
| | Address Name: Concord Street1: 245 Learner Dr Street2: City: Tulsa Province: Oklahoma ... Remove |
| Maximum Capacity | 20 |
| Event Date | From: Thu, May 06, 2010 To: Thu, May 06, 2010 <input checked="" type="checkbox"/> Ignore the time |
| Time Zone | (GMT-07:00) US/Mountain |
| Registration Contact(s) | joseph.mate  |
| Online Pay Account | No online payment |
| Internal Memo | <div></div> |
| Additional Options | <input type="checkbox"/> Disable online registration <input checked="" type="checkbox"/> Enable waiting list <input checked="" type="checkbox"/> Manually move registrants on waiting list when there are available spaces <input type="checkbox"/> Users can register after the event has started <input type="checkbox"/> Enable partial agenda sessions registration |
| Update Cancel | |

- 1) Click on **Add Event**.
- 2) Enter in an **Event Title** (This is a mandatory field).
- 3) The **Event Summary** uses the rich text editor, allowing you to add photos, videos, links, and other items as needed.
- 4) Select your **Event Type** from the dropdown list.
- 5) If applicable you can enter in an **Event Code**.
- 6) Enter in the **Location** for the event. If you have defined a location click on the icon and select it from the list. To manually enter in the location select **Input Location** and fill out the information.

To define a location for the event you can follow the steps in the *Location and Resources* found on page 37.

- 7) Choose your **Language of Delivery** from the dropdown menu.
- 8) Set a maximum capacity limit by entering a number in the **Maximum Capacity** field.
- 9) Enter in the **Date(s)** and **Time** of your event. If this is an all day event you can select **Ignore the time**.
- 10) The **Time Zone** should be automatically selected; if it is incorrect you can select your correct **Time Zone** from the dropdown menu.
- 11) To select **Registration Contact(s)** click on the  icon at the end of the field. If the contact you want to add is not there, your website administrator will need to create an account for them.
- 12) If your registration requires payment select the **Online Pay Account** from the dropdown menu. The online payment needs to be configured from the **System Administration** section of your website. For more information on how to configure the **Online Pay Account** please see
- 13) Additional options that you can select:
 - a. **Disable online registration:** Do not allow online registrations. All registrations will have to be added manually by an **Event Administrator**.
 - b. **Enable waiting list:** This allows you to have a waiting list for the event. If the event has reached capacity, users who attempt to register will be placed on the waiting list.

- c. **Manually move registrants on waiting list when there are available spaces:** Will make administrators responsible for manually moving people from the waiting list to the approved list. If this is not checked, users will automatically be moved from the waiting list to the approved list as soon as space is made available.
 - d. **Users can register after the event has started:** This allows users to continue to register after the event has begun.
 - e. **Enable partial agenda session registration:** Enabling this option allows users to register for specific agenda items without needing to participate in the full agenda. This can be useful if you have an event like a multi-day conference where not all registrants will be attending every session or even every day of the conference.
- 14) When you have completed filling out the event information click **Add Event**. You will now see **Tabs** across the top and will be on the **Event Information Tab** inside the **Basic Information Tab**.
- At anytime that you decide that you want to cancel, at the bottom of the form click on **Cancel**.



Registration Types

| Registration Types | | | | | + Add Registration Type | |
|--------------------|-------------|----------------|----------|-------------------------------------|---|--|
| Type Name | Description | Initial Status | Category | Available | Actions | |
| Teachers | | Unapproved | Local | <input checked="" type="checkbox"/> | | |

If there is no **Registration Type** then you will need to create one by clicking **Add Registration Type**.

- 1) Enter in a name for your **Registration Type**.
- 2) Create a **Description** which can include pictures, videos and links to resources.
- 3) Add the appropriate **Associated User Groups**.

This is a mandatory field and you need to choose the associated user groups that will be allowed to register for the event. The user groups are created under **Administration -> System Administration -> Manage Groups and Roles**. If a group of users that you want to add is not available, you will need to create the group or have your site administrator create the group for you.



Tip: If you would like to make registration type for all users, choose the **Registered Users** group.

- 4) Select an **Initial Registration Status** from the dropdown menu.

The **Initial Registration Status** of a registrant can be set as the following:

Approved: The user or registrant will automatically be approved and registered for the event unless there is a wait list. If there is a wait list then the user or registrant will be unapproved until there is a spot open.

Unapproved: Registrant will need to be approved by the registration contact that was defined earlier in the basic information tab or a site administrator.

Unapproved until payment received: You can select this option if you want your users or registrants to not be approved until payment has been received.

- 5) Click on **Add Registration Type** to save and complete.

Agenda

The agenda allows you to add event sessions as part of your event. You can create multiple sessions for your event. This is optional when creating your event.

| Find Event Sessions: <input type="text"/> <input type="button" value="Search"/> <input type="button" value="View All"/> | | | | | | | |
|---|-------------------|-------------------|-----------------|--------------|-------------|----------|--------|
| Event Sessions + Add Session | | | | | | | |
| Session | Date | Time | Location | Availability | Registrable | Capacity | Action |
| Introduction to Event Registration | Thu, May 06, 2010 | 09:00 AM-11:00 AM | To be announced | Mandatory | Yes | 20 | |
| Event Registration Hands On Practice | Thu, May 06, 2010 | 11:00 AM-12:00 PM | To be announced | Regular | Yes | 20 | |
| Question Period | Thu, May 06, 2010 | 12:00 PM-01:00 PM | To be announced | Optional | Yes | 20 | |

- 1) To create an event session click on **Add Session**.
- 2) Enter in a **Title** for the session.
- 3) Select the **Type** from the dropdown menu.
The type of registration you can select will organize your agenda sessions and when you are using the reports will be able to use the search function for type.
- 4) Enter in a **Description**.
- 5) For the **Session Availability** select what you feel is appropriate for your event. You can make your session available to all registration types or only selected registration types by clicking **Select Registration Types**, selecting the **Registration Type**, clicking on **Add Selected** and then clicking **OK**.
- 6) For the **Place/Room** click on the button to select an available room.
- 7) The **Capacity** is the number of registrants who may sign up for a particular session.
- 8) Enter in a **Message For Full** session message.
- 9) Select the date for your session from the **Schedule On** dropdown menu.
- 10) If a **parent** session is available, select it from the dropdown menu.
A parent session is an existing session, that when selected, will allow the current session to occur concurrently with the parent session (and with any sibling sessions).
- 11) Select the **Time** for this session.
- 12) Click **Add Session** to save and complete.

| Event Session Details | |
|-----------------------|---|
| Title | <input type="text"/> |
| Type | <input type="text"/> If you select other for type, you can enter a new type. |
| Description | <div> </div> <div> <input type="text"/> </div> <div> <input type="button" value="Design"/> <input type="button" value="HTML"/> <input type="button" value="Preview"/> </div> |
| Session Availability | <input type="radio"/> Mandatory session. All registrants must attend, such as check in and check out. <input checked="" type="radio"/> Regular session which is included in the basic package <input type="radio"/> Optional session which is excluded from the basic package |
| Available To | <input checked="" type="radio"/> All registration types <input type="radio"/> Selected registration types <input type="text"/> <input type="button" value="Select Registration Types"/> |
| Place/Room | <input type="text"/> <input type="button" value="..."/> |

| | |
|--|--|
| Capacity | <input type="text"/> |
| Message For Full | <input type="text"/> |
| Schedule On | Thu, May 06, 2010 <input type="button" value="v"/> |
| Parent Session | <input type="text"/> <input type="button" value="v"/> |
| From | <input type="text" value="03"/> : <input type="text" value="27"/> : <input type="text" value="PM"/> To <input type="text" value="03"/> : <input type="text" value="27"/> : <input type="text" value="PM"/> |
| <input type="button" value="Add Session"/> <input type="button" value="Cancel"/> | |

Policies

| Policies | Add Policy |
|------------------------|------------|
| No policies available. | |

If your event has any policies that registrants need to be aware of you can enter them on this tab. For example if your event needs to have a user or registrant agree to a privacy policy you would add it here.

To add a policy, follow the steps below:

- 1) Click on **Add Policy**.
- 2) Enter in the **Name** of the policy.
- 3) You can enter a **Category** if needed.
- 4) In the **Description**, enter in the policy information.
- 5) Check **Registrant must agree with the policy before he/she can continue to register** if the policy is mandatory.
- 6) To save the policy click **Add Policy**.

Policy Details

Name

Category



Description



Rich text editor toolbar: ABC, Undo, Redo, Bold, Italic, Underline, Font Name, Size, Real font, etc.

☒ Registrant must agree with the policy before he/she can continue to register.

Add Policy **Cancel**

Lodging

| Hotels | |  Add Hotel |
|----------------------------|---|---|
| Hotel Name | Action | |
| Comfort Inn (416-736-4700) |  | |

| Meal Types | |  Add Meal Type |
|------------|---|---|
| Type Name | Action | |
| Kosher |  | |
| Vegetarian |  | |
| Regular |  | |

Some events that you create may require a registrant to select a meal plan or have a place to stay.

To add a hotel, click on **Add Hotel**. Select a hotel or multiple hotels from the list and then click on **Add Selected**. To save your choices click **OK**.

| | | |
|--|----------------------|--------------|
| Search | <input type="text"/> | Search |
| Hotels | | |
| Double Tree Hotel DoubleTree Hotel Dallas-Campbell Centre Hilton Dallas/Park Cities Holiday Inn (416-665-3500) Marriott Austin Airport South Northcross Suites Austin Northwest Omni La Mansion Del Rio Radisson Denver Stapleton Plaza hotel Ramada Inn Schulich Executive Centre On-Campus (416-650-8300) | | |
| | | Add Selected |
| Selected Hotels | | |
| <div></div> | | |
| | | Remove |
| | | OK Cancel |

To add a meal type click **Add Meal Type**, enter in the **Meal Type** and then click **Add**.

| | |
|--------------------------|----------------------|
| Meal Type Details | |
| Meal Type | <input type="text"/> |
| Add Cancel | |

Setting Prices

Payment Settings

Default Currency: USD

Pay To

Design HTML Preview

Save Settings

Price Information

| Session | Registration Type | Price | Action |
|------------------------|------------------------|------------|---------------------------|
| All Mandatory Sessions | All Registration Types | \$5.00 USD | Add Price |

Prices are optional for your event. To configure the **Payment Settings** follow the steps below.

- 1) Select the default **Currency**. The default **Currency** is configured by your site administrator. To add a default Currency click on **Administration -> System Administration -> Manage Currencies** and click the radio button in the **Default** column beside the currency that is appropriate.

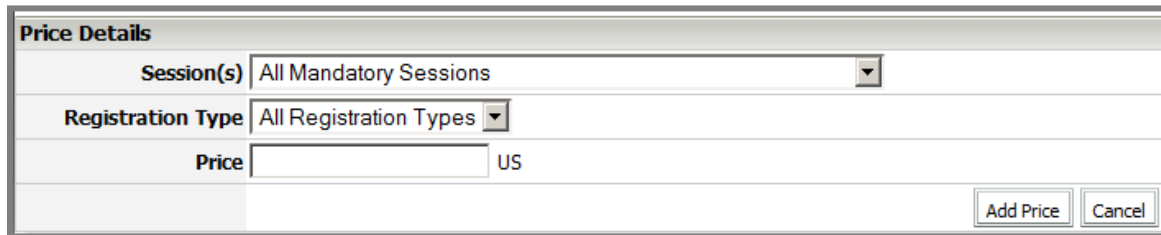


Note: The currency must be set to **Enable** in order to be the default currency.

| List of the currencies | | | | | | |
|--------------------------------------|------|--------|--------|---------|----------------------------------|---|
| Name | Code | Number | Symbol | Decimal | Default | Action |
| Australian Dollar | AUD | 36 | \$ | 2 | <input type="radio"/> | <input type="radio"/> Enable <input checked="" type="radio"/> Disable |
| Belarussian Ruble | BYB | 112 | | 0 | <input type="radio"/> | <input type="radio"/> Enable <input checked="" type="radio"/> Disable |
| Belarussian Ruble | BYR | 974 | | 0 | <input type="radio"/> | <input type="radio"/> Enable <input checked="" type="radio"/> Disable |
| Cyprus Pound | CYP | 196 | | 2 | <input type="radio"/> | <input type="radio"/> Enable <input checked="" type="radio"/> Disable |
| Lithuanian Litas | LTL | 440 | | 2 | <input type="radio"/> | <input type="radio"/> Enable <input checked="" type="radio"/> Disable |
| Mauritius Rupee | MUR | 480 | | 2 | <input type="radio"/> | <input type="radio"/> Enable <input checked="" type="radio"/> Disable |
| Russian Ruble | RUB | 643 | | 2 | <input type="radio"/> | <input type="radio"/> Enable <input checked="" type="radio"/> Disable |
| Russian Ruble | RUR | 810 | | 2 | <input type="radio"/> | <input type="radio"/> Enable <input checked="" type="radio"/> Disable |
| US Dollar | USD | 840 | \$ | 2 | <input checked="" type="radio"/> | <input type="radio"/> Enable <input type="radio"/> Disable |
| US Dollar (Next day) | USN | 997 | \$ | 2 | <input type="radio"/> | <input type="radio"/> Enable <input checked="" type="radio"/> Disable |
| US Dollar (Same day) | USS | 998 | \$ | 2 | <input type="radio"/> | <input type="radio"/> Enable <input checked="" type="radio"/> Disable |

- 2) Select a currency from the dropdown menu. Enter your organization's accounts receivable information in the **Pay To** field.
- 3)

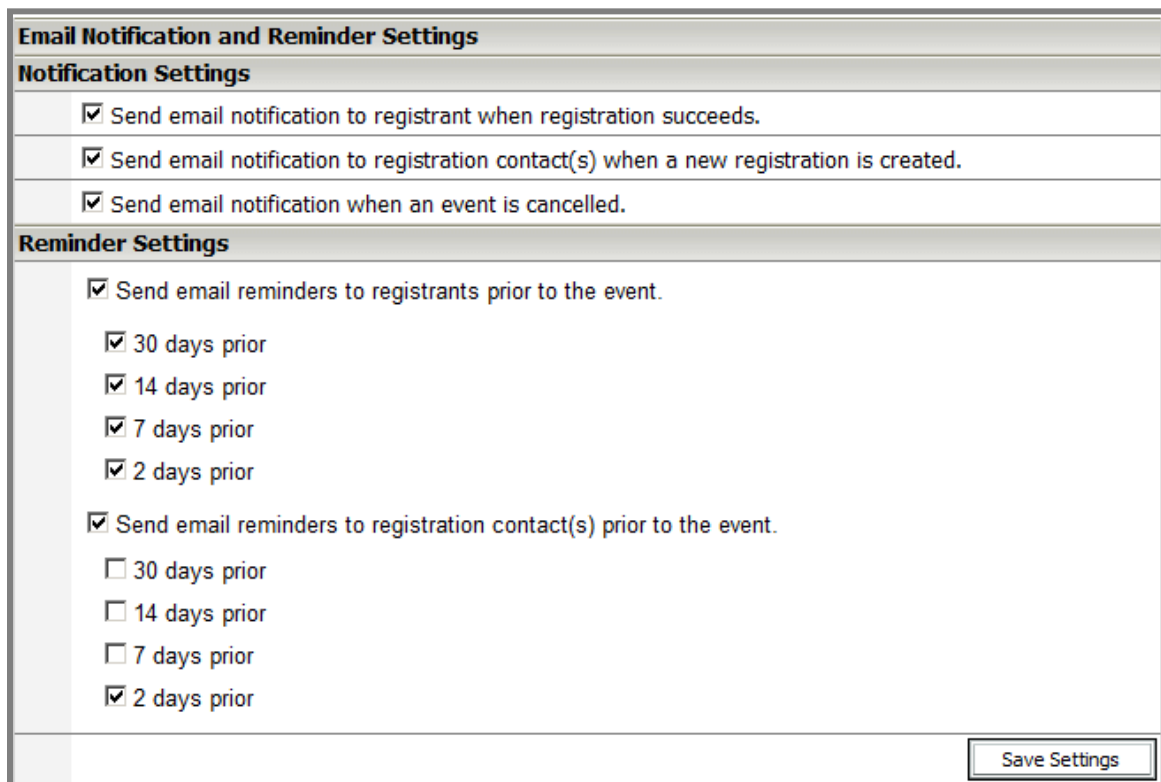
If you want to charge for your event sessions under the **Agenda** click **Add Price**.



The **Price Details** form contains three rows. The first row has a label **Session(s)** and a dropdown menu currently showing **All Mandatory Sessions**. The second row has a label **Registration Type** and a dropdown menu currently showing **All Registration Types**. The third row has a label **Price**, a text input field, and the text **US**. At the bottom right of the form are two buttons: **Add Price** and **Cancel**.

From the **Session(s)** dropdown menu choose which session or sessions you would like to apply the price to, and then select the **Registration Type** and enter your price below. Click **Add Price** to save your changes.

Sending Notifications



The **Email Notification and Reminder Settings** form is divided into two sections. The **Notification Settings** section contains three rows, each with a checked checkbox and text:
1. ☒ Send email notification to registrant when registration succeeds.
2. ☒ Send email notification to registration contact(s) when a new registration is created.
3. ☒ Send email notification when an event is cancelled.
The **Reminder Settings** section contains two groups of settings. The first group is for registrants and has a checked checkbox followed by four checked checkboxes for 30, 14, 7, and 2 days prior. The second group is for registration contact(s) and has a checked checkbox followed by four checkboxes for 30, 14, 7, and 2 days prior, with only the 2 days prior checkbox being checked. At the bottom right is a **Save Settings** button.

You can have your event notify the **Registrant** as well as the **Registration Contact(s)** to send an email notification for the following situations:

- 1) Email notification to the registrants when registration succeeds.
- 2) Email notification if the event is cancelled.
- 3) Reminder to the registrant prior to the event at intervals of 30, 14, 7, and 2 days prior to the event.

Tabs/Sections

Settings for Event Information Pages
 Event Information Display Style Multiple Tabs
Save Settings

Please choose tab/ sections which will be displayed on Event Website

| Tab/Section | Display | Actions |
|-------------------------|-------------------------------------|---------|
| Summary | Always | |
| Agenda | <input checked="" type="checkbox"/> | |
| Policy | <input checked="" type="checkbox"/> | |

Customized Tab/Sections + Add Customized Tab/Section
 No item available.

You can use this section to configure the way **Event Registration** is presented when a **Registrant** fills out the form. On the **Event Information** page you can have a **Multiple Tab** view or **Multiple Sections on One Page** view. Click **Save Settings** to keep your changes.

Next you can decide if you want the **Agenda** or **Policy** sections to display by checking the boxes under **Display**. The **Actions** section will allow you to change the order of the tabs by using the arrows or you can edit the name of the tab. If you want to make a customized tab/section click on **Add Customized Tab/Section**, enter in a **Title** and fill in the **Page Body**, and then click **Add Customized Tab/Section** to save.


Custom Tab Details
 Title









Page Body

Design HTML Preview

Add Customized Tab/Section Cancel

Summary Tab/Section

This section will allow you to define which information will be displayed on the **Event Registration Summary** screen once the registrant gets to that point in the registration. You can also edit the name and change the order of the fields using the notepad icon  and the arrows in the **Actions** column.

| Please choose information which will be displayed on Summary tab/section. | | |
|---|-------------------------------------|---|
| Event Title | Display | Actions |
| Event Description | <input checked="" type="checkbox"/> |    |
| Event Information | <input checked="" type="checkbox"/> |    |
| Contact Information | <input checked="" type="checkbox"/> |    |
| Payment Information | <input checked="" type="checkbox"/> |    |

Event Messages
















The **Event Messages** section allows administrators to add messages that the registrant will see on the screen. In the **Messages of Price Package** section you can enter in the names and descriptions of each package. For **Messages of Registration Status and Payment**, enter in the message that you would like the registrant to see. To save all of your changes click **Submit**.

| | |
|---|--|
| Event Informations | |
| Event Title | Sharpschool Event Registration Workshop |
| Event Summary | <p>Sharpschool Event Registration Workshop</p> |
| Event Date | Thu, May 06, 2010 – Thu, M |
| Messages of Price Package | |
| Basic Package Name | |
| Basic Package Description | |
| Complete Package Name | |
| Complete Package Description | |
| Customized Package Name | |
| Customized Package Description | |
| Messages of Registration Status and Payment | |
| Common Registration Status Message | |
| Registration Received and Waiting for Approval | |
| Registered and Approved | |
| Successfully Registered and Not Need Pay | |
| Registered and Pay Request | |
| Successfully Registered and Paid | |
| Event Registration Online Pay Failed | |
| <input type="button" value="Save"/> <input type="button" value="Submit"/> <input type="button" value="Cancel"/> | |

Registration Form



























General Tab

You can choose which information is to be included on your **Event Registration Form**. If you do not want a section to be **Visible** uncheck the box. To edit the **Name**, click **Edit** and to change the order, use the blue arrows in the **Actions** column.


| Information | | | |
|-------------------------|---|-------------------------------------|---|
| Information Sections | Description | Visible | Actions |
| Personal Information | Registrant's Personal Information | <input checked="" type="checkbox"/> |    |
| Agenda | Registrants can choose any sessions which they would like to register to. | <input checked="" type="checkbox"/> |    |
| Lodging | Lodging Preferences, Meal Preferences and Other Preferences. | <input checked="" type="checkbox"/> |    |
| Transportation & Travel | Transportation Requirement and Travel Preferences | <input checked="" type="checkbox"/> |    |
| Policy | Show up all policies applied to this event | <input checked="" type="checkbox"/> |    |

Registrant Info

You can use the **Registrant Info** tab to define what information is required to be filled out on the registration form. Simply check the box, under the **Visible** column, of the item(s) you want registrants to fill out. You can change the order by using the blue arrows in the **Order** column.









| Personal Information | | |
|---|-------------------------------------|---|
| Attribute Name | Visible | Order |
| Salutation | <input type="checkbox"/> |   |
| First Name | <input checked="" type="checkbox"/> |   |
| Last Name | <input checked="" type="checkbox"/> |   |
| Job Title | <input type="checkbox"/> |   |
| From Sponsor | <input type="checkbox"/> |   |
| Business Address | <input checked="" type="checkbox"/> |   |
| Home Address | <input type="checkbox"/> |   |
| Other Information | | |
| Attribute Name | Visible | Order |
| Organization/District School Board | <input type="checkbox"/> |   |
| Employer/School | <input type="checkbox"/> |   |
| Emergency Contact Name | <input type="checkbox"/> |   |
| Emergency Contact Phone | <input type="checkbox"/> |   |
| Social Insurance Number | <input type="checkbox"/> |   |
| Custom Attributes | | |
| No data available | | |
|  Add Custom Attribute  Delete All | | |

If you need to add a field or section to your form that is not already listed you can use the **Custom Attributes**. To add a **Custom Attribute**, click **Add Custom Attribute**, enter in the name of the attribute, select the **Data Type** and then click **Add**.

| Attribute Details | |
|--|--|
| Attribute Name | <input type="text"/> * |
| Data type | String  |
| <input type="button" value="Add"/> <input type="button" value="Cancel"/> | |





Lodging

The **Lodging** tab will allow you to change the option to make the **Lodging Information Visible** on the registration form, as well as the **Order** the on the form by using the blue arrows to move the preferences up or down.

| Lodging Information | | |
|---------------------------|-------------------------------------|---|
| Information Name | Visible | Order |
| Accommodation Requirement | <input checked="" type="checkbox"/> |  |
| Room Preference | <input checked="" type="checkbox"/> |   |
| Smoking Preference | <input checked="" type="checkbox"/> |   |
| Meal Preference | <input checked="" type="checkbox"/> |   |
| Parking Requirement | <input checked="" type="checkbox"/> |  |

Travel

The **Travel** tab allows you to make the **Transportation Requirement, Arrival Information, and Departure Information** sections **Visible** on the registration form and change the **Order** in which they appear on the form.

| Travel Information | | |
|----------------------------|-------------------------------------|---|
| Pretty Name | Visible | Order |
| Transportation Requirement | <input checked="" type="checkbox"/> |  |
| Arrival Information | <input checked="" type="checkbox"/> |   |
| Departure Information | <input checked="" type="checkbox"/> |  |

Registrant Tab

| Unapproved Registrants | | | | | | |
|--------------------------------------|------------|-----------|-------------------|----------|-----------------|---|
| No item available. | | | | | | |
| Unapproved Until Payment Registrants | | | | | | |
| No item available. | | | | | | |
| Approved Registrants | | | | | | Available Spaces: 19 |
| Screen Name | First Name | Last Name | Registered On | Type | On Waiting List | Action |
| johnny.fever | Johnny | Fever | Tue, May 04, 2010 | Teachers | |   |

The **Registrant** tab of **Event Registration** allows you to view any **Unapproved Registrants, Unapproved Until Payment Received** and **Approved Registrants**.

The **Unapproved Registrants** can be approved by placing a check in the **Approved** space and cancelled by clicking on the **Cancel** under the **Actions** section. You can also get such information as when the registrant registered, **Screen Name**, **First** and **Last Name**, and the registration **Type**.

When you click the **Screen Name** you will see and be able to modify the registration form that the registrant has submitted.

You can resend the event notification messages to the registrant or cancel their registration under the **Actions** section.

Available Spaces lets you know how many spaces are still open for registration for the event.

Reports

As an Administrator or Event Registration Author, you will have access to the following reports for the event. To view a report simply select the options that are presented to you when you select the type of report from the menu and click **View Report**.

You can export the reports as Excel or PDF files. Simply click the **Select a format** dropdown, choose your desired format and click **Export**.

Outstanding Fee Summary: Shows outstanding fees for your sessions.

| <div> <div> <div>1 of 1</div> <div>Select a format</div> <div>Export</div> </div> </div> | | | |
|--|---------|---------|-------------|
| Outstanding fee summary | | | |
| Organization | Payable | Payment | Outstanding |
| | 5.00 US | US | 5.00 US |
| Total: | | | 5.00 US |

Outstanding Fee by Organization: Shows the outstanding fees by organization.

| <div> <div>Report Parameters</div> <div> <div>Organization</div> <div>View Report</div> <div>Close</div> </div> </div> | | | |
|--|-----------------------|----------|-------------|
| <div> <div>1 of 1</div> <div>100%</div> <div>Find Next</div> <div>Select a format</div> <div>Export</div> </div> | | | |
| Outstanding fee by Organization | | | |
| Name | Email | Status | Outstanding |
| Johnny Fever | johnny.fever@wkrp.com | approved | 5.00 US |
| Total: | | | 5.00 US |

| <div> <div>1 of 1</div> <div>100%</div> <div>Find Next</div> <div>Select a format</div> <div>Export</div> </div> | | | | | | | |
|--|--------------|----------|-------------------|-----------------------|------------------------------------|--------------------------------------|-----------------|
| Agenda Registration Detail | | | | | | | |
| Name | Organization | Employer | Registration Type | Email | Introduction To Event Registration | Event Registration Hands On Practice | Question Period |
| Johnny Fever | | | Teachers | johnny.fever@wkrp.com | Y | Y | Y |
| Total: 1 | | | | | | | |

Cancellation Report: Allows you to see who has cancelled the registration for your event either by the registrant or registration contact.

| <div> <div>1 of 1</div> <div>100%</div> <div>Find Next</div> <div>Select a format</div> <div>Export</div> </div> | | | |
|--|-------|-------------------|--------------|
| Cancelled Registrations Information | | | |
| Name | Email | Registration Type | Cancelled On |
| Total: 0 | | | |

Dietary Summary: Shows a summary of the preferences and how many registrants have **Dietary Restrictions** such as kosher or vegetarian.

| <div> <div>1 of 1</div> <div>100%</div> <div>Find Next</div> <div>Select a format</div> <div>Export</div> </div> | |
|--|-------------|
| Registration Summary by Dietary | |
| Dietary | Registrants |
| No Preference | 1 |
| Count: 1 | |

Dietary Detail: Provides a more detailed report of the **Dietary Preference** of registrants.

| Report Parameters | | |
|--|--------------|---|
| Dietary Preference | All | |
| | | <div>View Report</div> <div>Close</div> |
| <div> <div>1 of 1</div> <div>100%</div> <div>Find Next</div> <div>Select a format</div> <div>Export</div> </div> | | |
| Dietary Details | | |
| Dietary Preference | Name | Email |
| No Preference | Johnny Fever | johnny.fever@wkrp.com |

Parking Summary: Shows a summary of parking required for your event.

| <div> <div>1 of 1</div> <div>100%</div> <div>Find Next</div> <div>Select a format</div> <div>Export</div> </div> | |
|--|----------------------|
| Parking Requests | |
| Date | Parking Space Needed |
| Total: | |

Parking Detail: Allows you to see which registrants require parking on which days.

| <div> <div>1 of 1</div> <div>100%</div> <div>Find Next</div> <div>Select a format</div> <div>Export</div> </div> | | | | |
|--|-----------|-------|-------------------|-----------------|
| Parking Detail | | | | |
| First Name | Last Name | Email | Parking Date From | Parking Date To |
| | | | | |

Lodging Summary: A summary report of registrants' lodging needs.

| Report Parameters | | |
|--|-----------------|-------------------|
| Accommodation Preference | All | |
| Room Preference | All | |
| | | View Report Close |
| <div> <div>1 of 1</div> <div>100%</div> <div>Find Next</div> <div>Select a format</div> <div>Export</div> </div> | | |
| Lodging Summary | | |
| Accommodation Preference | Room preference | Registrant |
| No Preference | No preference | 1 |
| Total: | | 1 |

Lodging Details: A report listing the lodging that is required per registrant.

| Report Parameters | | |
|--|-----------------------|--------------------------|
| Accommodation Preference | All | |
| Room Preference | All | |
| | | View Report Close |
| <div> <div>1 of 1</div> <div>100%</div> <div>Find Next</div> <div>Select a format</div> <div>Export</div> </div> | | |
| Lodging Details | | |
| Name | Email | Accommodation Preference |
| Johnny Fever | johnny.fever@wkrp.com | No Preference |

Registrant Payment: Shows the registrants' payment details.

| <div> <div>1 of 1</div> <div>100%</div> <div>Find Next</div> <div>Select a format</div> <div>Export</div> </div> | | | | | | |
|--|--------------|----------|-------------------|-------------|------|----------------|
| Registrant Payment | | | | | | |
| Name | Organization | Employer | Registration Type | Payable | Paid | Payment Method |
| Johnny Fever | | | Teachers | \$ 5.00 USD | | |
| Total: | | | | 1 | | |

Session Registrant Detail: Shows the session and the registrants that are registered with full details.

Search Conditions

Session

Sorting and Order

Optional Sorting Columns Registrant

Selected Sorting Columns

1 of 1 100% Find | Next Select a format Export

Session Registrant Detail

| Name | Organization | Employer | Email | Home Email | Payable | Paid |
|--------------|--------------|----------|-----------------------|------------|---------|------|
| Johnny Fever | | | johnny.fever@wkrp.com | | 5 | |
| Johnny Fever | | | johnny.fever@wkrp.com | | 5 | |
| Johnny Fever | | | johnny.fever@wkrp.com | | 5 | |

Total: 3

Session Registrant Summary: Provides a summary of how many registrants are registered for each session.

1 of 1 100% Find | Next

Select a format Export

Session Registrant Summary

| Session Name | Sub-session Name | Registrants |
|--------------------------------------|------------------|-------------|
| Event Registration Hands On Practice | | 1 |
| Introduction to Event Registration | | 1 |
| Question Period | | 1 |

Total: 3

Configuring Event Security

Direct Permissions | Actual Permissions

Security Class
Please check the security class associated with this object

☐ Level 1

Update Security Class

Permissions Granted To

Add

Inherit Permissions

☒ Allow Inheritable Permissions From Parent to Propagate to This Object

Apply

Administrators or event creators have the ability to assign permissions to users to allow them to edit or modify the event or be granted access to the event registration. To make changes to the security of an event, click on the **Security** tab.

To assign a user click **Add**, select the username or group of users and then click **Add** and then **OK**. If you want to remove a user or group click **Remove**.

Search

Groups (1 - 9 of 9)

- Administrators
- default profile group
- Global Administrators
- Guest
- Level 1
- Registered Users
- Staff
- Translators
- WKRP Cincinnati

Users (1 - 121 of 121)

- 123 12321
- Abeer Arshad
- Adam Curtis
- admin test
- Administrator
- Allan Hou
- Andray Sumeer
- Andrei Balandin
- Arthur Kok
- Barbara Geng

Add

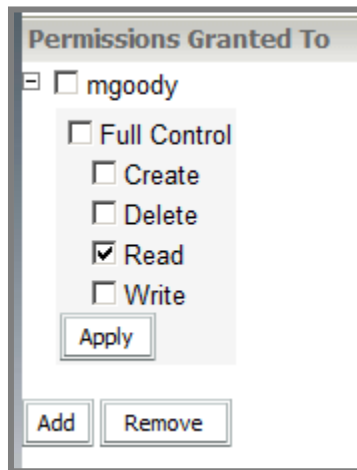
Selected Groups and Users(0)

Remove

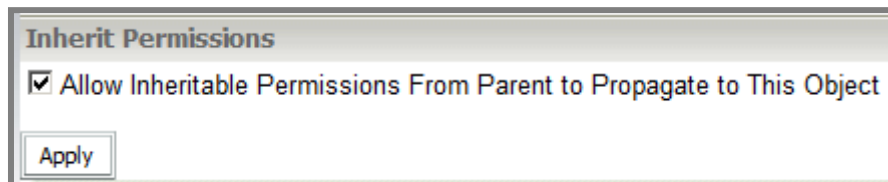
OK Cancel

To assign permissions click the **+** icon next to the user or group and select any combination as required. **Read** allows the user to only read and register; **Write** allows the user to make changes to the event, however they are not able to create an event or change the registration form; **Create** allows the user to create events and make modifications to the registration form; and **Delete** allows the user to delete or cancel items on the event registration form or in the event details, agenda sessions, and registrants. **Full Control** gives the user all the

Read, Write, Create, and Delete permissions and also allows the user to assign these permissions to other users.

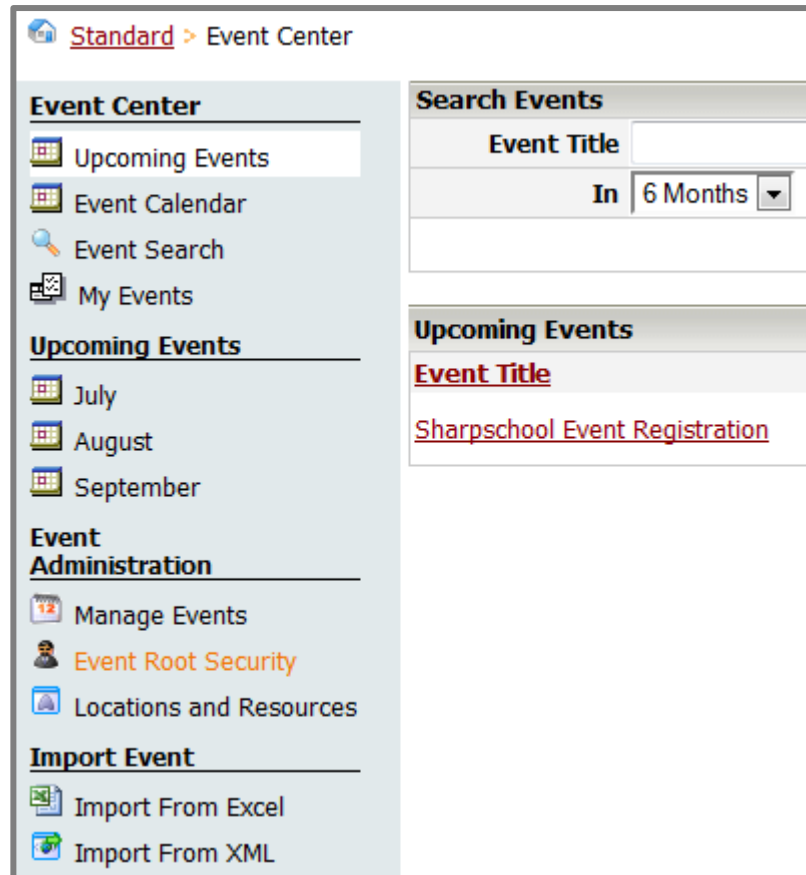


Allow Inheritable Permissions From Parent to Propagate to This Object will assign permissions based on the system permissions. In other words, whatever permissions a user has under **Administration -> Site Administration -> Security** will be inherited in Event Registration. By default a registered user will have **Read** access. If you want a user to be an event coordinator or have administrative permissions for the event add them to the **Permissions Granted To** list and provide them with the desired level of control.



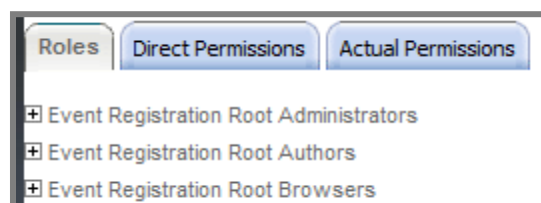
Configuring Event Root Security

This section controls permissions for **Event Registration**. Here administrators can assign event administrators and authors. To access these options, go to the Event Registration page and click **Event Root Security**.



The **Roles** tab:

- 1) **Administrator:** These users have complete control of the event
- 2) **Authors:** Can co-author content for the event
- 3) **Browsers:** Encompasses all users who can view and register for the event





Note: You must include the Guest user in the **Browser** role if you wish your events to be public.

The **Direct Permissions** tab lists the groups and/or users who have been assigned permissions to the event you are currently viewing. Here, you have the ability to **Add** and **Remove** permissions, and also inherit permissions for groups and/or users.

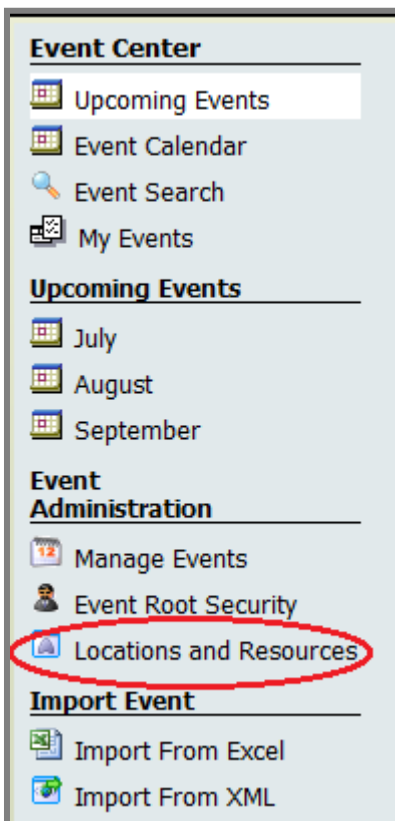
The **Actual Permissions** tab lists the individuals and groups who have inherited access to the event you are viewing.

You can also refer to *Chapter 1 – SitePublish (User Guide)* for more information regarding SharpSchool permissions and security.

Creating Locations and Resources

Administrators can create **Locations** and **Rooms**. These locations can then be selected while creating events.

To access the locations and resources click **Locations and Resources** under **Event Administration** on the left hand navigation.



Once you click on **Locations and Resources** you will see the screen below:

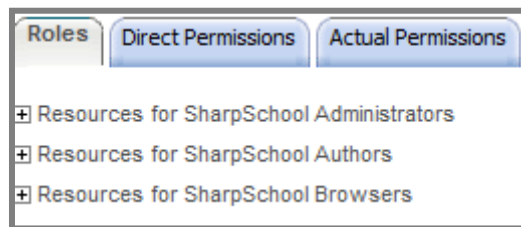
| Search Locations <input type="text"/> | | In | All Categories ▼ | Valid ▼ | Find | View All |
|---------------------------------------|----------|---|------------------|---------|------|----------|
| Locations | | + Add Location Security | | | | |
| Name | Category | Reservable | Expire Date | Action | | |
| Chris college | College | Yes | | ✖ | | |
| SharpSchool | Office | Yes | | ✖ | | |
| Sharpschool Office | Office | Yes | | ✖ | | |

Search Locations

The **Search Locations** field allows you to search for a specific location by category name and validity.

Security



The security link will allow administrators to assign permissions to users to be allowed to create, edit, view or delete locations for the Event Registration. For more information on how these permissions work see *Configuring Event Root Security* on page 35.



How to create a location

To add a new location click on **Add Location**.

| Search Locations <input type="text"/> | | In | All Categories ▼ | Valid ▼ | Find | View All |
|---------------------------------------|----------|---|------------------|---------|------|----------|
| Locations | | + Add Location Security | | | | |
| Name | Category | Reservable | Expire Date | Action | | |
| Chris college | College | Yes | | ✖ | | |
| SharpSchool | Office | Yes | | ✖ | | |
| Sharpschool Office | Office | Yes | | ✖ | | |

| Location Details | |
|---|--|
| Category | College ▼ |
| Name | <input type="text"/> |
| Address Line 1 | <input type="text"/> |
| Address Line 2 | <input type="text"/> |
| City | <input type="text"/> |
| State/Province | New York ▼ |
| Country | UNITED STATES ▼ |
| Zip/Postal Code | <input type="text"/> |
| Time Zone | (GMT-07:00) US/Mountain ▼ |
| Website | <input type="text"/> |
| Phone (With Extension) | <input type="text"/> |
| Fax (With Extension) | <input type="text"/> |
| Contact Person | <input checked="" type="radio"/> Existing Site User <input type="text"/>  ▼ <input type="radio"/> No Contact Person <input type="radio"/> Non Site User |
| Reservable In Room Reservation | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| Expire Date | <input type="text"/>  ▼ |
| <input type="button" value="Add Location"/> <input type="button" value="Cancel"/> | |

Fill out the form with the required information such as **Category**, **Name**, **Address**, **City**, **State/Province**, **Country**, **Zip/Postal Code**, **Time Zone**, **Website**, **Phone** and **Fax** numbers.

When filling out the **Contact Person** for the location you can select the following options:

Existing Site User: Select a user from the list of users available on your website

No Contact Person: Do not choose a contact person

Non Site User: Allows you enter someone who is not a registered user on your website.




Enter in the **First** and **Last Name**, **Office Phone Number**, **Mobile Phone Number** if applicable and **Email Address**.

If applicable enter in an **Expire Date**. Once the **Expire Date** has passed the location will no longer be available for reservations.

Once you have completed filling out the form, click on **Add Location**.

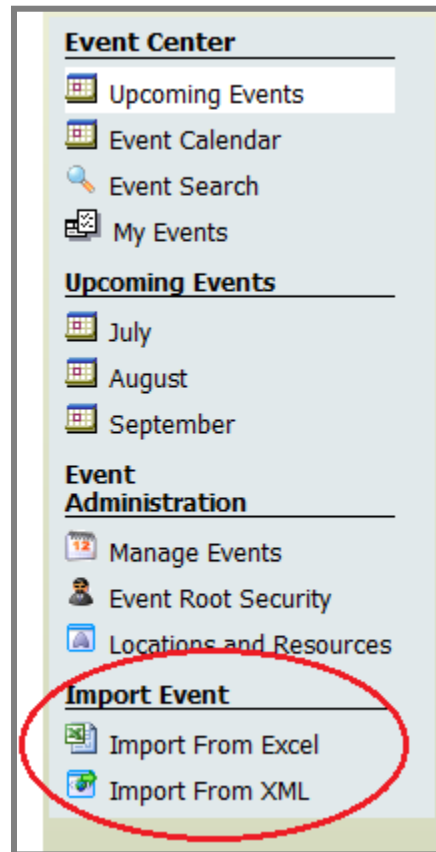
Deleting a Location

If you want to edit your location simply click on the name. To delete the location, click on **Delete** under the **Action** column.

| Locations | | | | |
|------------------------------------|----------|------------------------------|-------------|---|
| | | Add Location | | Security |
| Name | Category | Reservable | Expire Date | Action |
| Chris college | College | Yes | |  |
| SharpSchool | Office | Yes | |  |
| Sharpschool Office | Office | Yes | |  |

Importing Events

You can import events that are saved in Excel or XML format from the left hand navigation under the **Import Event** section.



From Excel

| Import events from Excel file | |
|-------------------------------|---|
| Location | Sharpschool Office ▼ |
| | <input type="checkbox"/> Automatically make room reservations for imported upcoming events |
| Attention: | All rooms defined in the import file must be in the location set above. If the room does not exist in the above location, it will be created. |
| Source Excel File | <input type="text"/> Browse... View Example File |
| <div>Import Cancel</div> | |

- 1) Click **Import from Excel** from the left hand navigation under **Import Events**.
- 2) Choose the location where you wish to import your event.
- 3) If required check **Automatically make room reservations for imported upcoming events**.
- 4) Click **Browse**, locate your file and click **Open**.
- 5) Click **Import** to complete.



Tip: If you need an example of what you require for the Excel spreadsheet click **View Example File**.

From an XML File

| Import Events From XML File | |
|-----------------------------|--|
| XML File | <input type="text"/> Browse... View Example File |
| <div>Import Cancel</div> | |

- 1) Click on **Import from XML** from the left hand navigation under **Import Events**.
- 2) Click on **Browse**, locate your file and click **Open**.
- 3) Click on **Import** to complete.



Tip: If you need an example of what you require for the XML spreadsheet click **View Example File**.